Logging into iPROC

1. Access the IAS web site (http://ias.usda.gov/)
2. Click on ‘Requisition Module’ link
3. Review the USDA Security Agreement and click the **[Accept]** button to continue
4. Enter **Username** and **Password**
5. Click the **[Log On]** button

Shopping Cart

Creating a Line Item

1. Click on the *Non-Catalog Request* tab
2. Select the appropriate **Item Type**
   - “Goods billed by quantity” – Default option for purchases that can be physically counted
   - “Goods or services billed as an amount” – Goods or services that do not reflect a quantity but a specific dollar value
3. Enter or Search for **Category**
4. Enter the **Item Description**
5. Enter or Search for the **Unit of Measure**
6. Ensure **Currency** remains as ‘USD’
7. Enter the estimated **Unit Price.** Do NOT include the dollar sign
8. Leave the **Exchange Rate Type** and the **Exchange Rate Date** as is

Suggesting a Vendor (Optional)

1. Enter or Search for the vendor **Name** and **Site**
2. If the vendor was not found, check the **New Supplier** box
3. Enter the contact **Name** and contact’s **Phone** number if known
4. Enter the **Supplier Item** if known

Adding to Cart

1. Upon completing the Item data and Supplier data, click **[Add to Cart]**
2. If additional Items are needed, select **Return to Shopping** to add additional items
3. When all items are added to the Cart, click **[Proceed to Checkout]**

Check-Out

Delivery Information

1. Enter or change the **Need-By Date** in the following format: DD-MMM-YYYY (e.g. 30-SEP-2006)
2. Enter the **Delivery-To Location** by searching for the Office
3. Select whether the *Delivery Information* applies to all line items in the cart by selecting the appropriate radio button:
   - **Yes** - Delivery Info applies to all line items.
   - **No, delivery information differs by item** - Delivery info differs by line item

   Selecting No will allow the user to enter delivery information specific to each Line Item
4. Click the **[Continue]** button

Billing Information

1. Leave **Taxable** and **Tax Code** as ‘No’. Do not Modify
2. Change the **Transaction Code** if needed
   - IQ-COMMIT – Should be selected when funding is available in the financial system
   - IQ-NOCOMMIT – Should be selected when funding is Subject to the Availability of Funds
3. Select whether the *Billing Information* applies to all line items in the cart by selecting the appropriate radio button:
   - **Yes** - Billing Info applies to all line items
   - **No, billing information differs by item** - Billing info differs by line item
4. Selecting No will allow the user to enter billing information specific to each Line Item
5. Click the **[Continue]** button

Review Charge Accounts

1. Click on the defaulted **Charge Account** link to select required account code
2. Select the **Charge Account** from the **Nickname** drop-down, or Enter/Search for the appropriate value for each segment that needs to be changed
3. Click the ‘select multiple charge accounts’ link to add multiple charge accounts to a single line item
4. Repeat Step 2 for each Charge Account to be added
5. Enter the **Percent** or **Quantity** to allocate the funding between the Charge Accounts and click the **[OK]** button
6. Select the ‘Apply this account to all requisition lines’ check box if the update Charge Account(s) apply to all Line items
7. Click the **[OK]** button
8. Repeat steps if different Charge Accounts apply to each Line Item
9. Click the **[Continue]** button

Notes and Attachments

1. Enter the **Requisition Description**
2. Enter the **Note to Buyer** and **Note to Approver** if needed
3. Click ‘Add Attachments’ if attachments (SOW, Justifications, etc.) need to be included
4. Select the **Attention to** from the drop-down list
5. Enter the **Description** for the Attachment
6. Select appropriate radio button to indicate the **Attachment Type.** If a ‘File’, click **[Browse]** to search for the file
7. Click the **[Continue]** button

Approver List

1. Click the **[Add Another Approver]** button if additional approver(s) need to be added to the list
2. Select the sequence from the Drop-Down List
3. Search for the Name of the Approver
4. Repeat for any additional Approvers. **Note: The last approver must always be a Budget Approver**
5. Click the **[Continue]** button

Review and Submit Requisition

1. Review the Requisition
2. Click the **[Submit]** button

Tips and Tricks

Printing a Requisition

A Requisition can only be printed by the Requisitioner from the "Review and Submit" Page.

1. Click on 'View' link under Items. The page will refresh
2. Click on 'printer-friendly version of this page' link.
3. Print Requisition via the internet browser

Searching via Flashlight

Any field with the Flashlight icon provides a search capability for that field

1. Click on the *Flashlight* icon
2. Select the Search By criteria from the drop-down list
3. Enter the value of the search criteria
4. Use a '%' before and after the value to serve as a wild card / search for variations on the value
5. Click the **[Select]** button next the result that matches

My Profile

- Save time by filling out the *My Profile* tab
- Enter default values for number of Requisition fields. These default values will populate the Requisition and will be used on Express Checkout
- Save frequently used Charge Accounts by adding them to the Favorite Charge Accounts Section. These Charge Accounts can be selected from the Nickname drop-down list
- Update Password from *My Profile*

Other User Tips

- Use the same Unit of Measure that will be used for invoicing
- Include a separate Line Item for shipping if shipping charges will be added to the invoice as a separate cost (in these cases use Category Name = '9999')
- Work closely with your Budget Approver to ensure proper use of accounting codes and budget office codes. Saves these Charge Account Codes in the *My Profile* tab
- Save commonly bought items to the Favorites by clicking the **[Add to Favorites]** button
- Include Attachments to provide additional details on the goods/service requested
- Use the **[Copy to Cart]** button to avoid having to re-enter individual line items when creating identical Requisitions

Help and Support

IAS Website

Visit http://ias.usda.gov/ for user guides, procedures/policy documents, release notes, and the latest news on IAS. Also, find Quick Tips and FAQs

Help Desk

IAS Help Desk is the first line of support for IAS Users. All issues encountered need to be logged with the IAS Help Desk to facilitate tracking and resolution. IAS Help Desk addresses User functional and technical issues and provides an avenue for User enhancement and system change requests

- Help Desk personnel are available from 8 AM – 8 PM Eastern Standard Time Monday through Friday
- IAS Users can log and create their Help Desk tickets through the following channels 24 hours a day:
    - Internet: http://www.iashelpdesk.com/request.htm
    - E-mail: support@iashelpdesk.com
    - Telephone: 1-866-IAS-8686

Creating a Requisition

IAS Quick Reference Guide